

SERIES TRAINING FOR PCC PARTICIPANTS

Session 14: Review/Conclusion



Session 14: contents

- “General” exercise discussion
- Questions?
- Information from Cooperative Cataloging Team

Discussion of "General" exercise

- [Paper answers]

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Session 14

3

Questions?

- Questions now?
- Questions after today?
 - Check documentation and training materials
 - Discuss with other catalogers
 - If about training materials, contact trainer
 - If about SARs, contact liaison
 - If about PCC, contact Coop Cat Team, RCCD

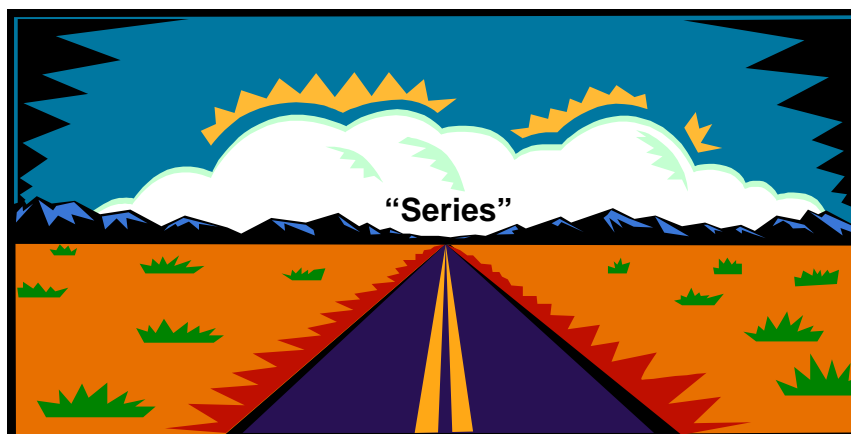


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4

Series: may the way be clear ... and the future bright!



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5

Information from Cooperative Cataloging Team, RCCD

- Series Institute is part of PCC NACO, administered by Coop Team at LC
- Program support, documentation, training materials, communications
- Consultation with LC Cataloging Policy and Support Office
- NACO authorizations from utilities

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6

Review before independence

- Basic NACO independence is a pre-requisite
- Classroom instruction
- Review period
- Independence before direct contribution to utility

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7

Connexion review procedures

- Submit to review file
- Notify reviewer by email (be sure to include OCLC code)
- Ask brief questions or cite rules in 952—otherwise, use email
- If your institution is independent for series, then you can be reviewed locally
- Otherwise an LC reviewer will be assigned

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8

Program for Cooperative Cataloging Series Institute
Instructor's Manual

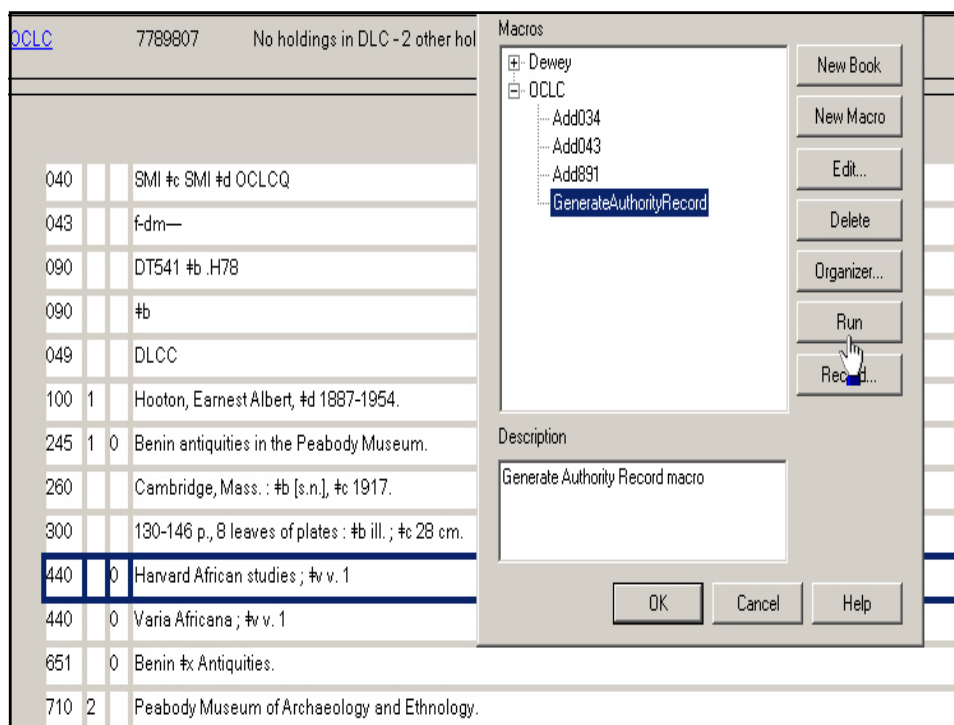
Connexion Authority Documentation

- OCLC documentation:
- http://www.oclc.org/support/documentation/connexion/browser/authorities/create_auth_records/
- PCC documentation for review (browser and client use similar concepts):
- <http://www.loc.gov/catdir/pcc/naco/connexion-naco.pdf>

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9



Program for Cooperative Cataloging Series Institute

Instructor's Manual

Type	z	Upd status	a	Enc lvl	n	Source	
Roman	■	Ref status	n	Mod rec		Name use	a
Govt agn	■	Auth status	a	Subj	a	Subj use	a
Series	a	Auth/ref	a	Geo subd	n	Ser use	a
Ser num	a	Name	n	Subdiv tp	n	Rules	c

040			DLC #b eng #c DLC
130	0		Harvard African studies
642			v. 1 #5 DPCC #5 DLC
643			Cambridge, Mass. #b s.n.
644			f #5 DLC
645			t #5 DPCC #5 DLC
646			s #5 DLC
670			Benin antiquities in the Peabody Museum, 1917: #b ser. t.p. (Harvard African studies)

Series: PCC Session 14 11

AuthoritiesCreateSingleRecordSeries

ARN NEW

Type	z	Upd status	a	Enc lvl	n	Source	c
Roman	■	Ref status	n	Mod rec		Name use	a
Govt agn	■	Auth status	a	Subj	a	Subj use	a
Series	a	Auth/ref	a	Geo subd	n	Ser use	a
Ser num	b	Name	n	Subdiv tp	n	Rules	c

040			DLC #b eng #c DLC
130	0		
430	0		
643			#b
644			f #5
645			t #5 DPCC #5
646			s #5
670			

Series: PCC Session 14 12

Program for Cooperative Cataloging Series Institute Instructor's Manual

Action--Submit for Review--Enter OCLC symbols

The screenshot shows the PCC Series Institute software interface. The main window has a menu bar (File, Cataloging, Authorities, Edit, Action, Batch, View, Tools, Window, Help) and a toolbar. Below the menu bar, there are tabs for 'ARN' and 'NEW'. The main area displays a table with columns for 'Rec stat', 'Type', 'Roman', 'Govt agn', 'Series', 'Ser num', 'Entered', 'Upd status', 'Ref status', 'Auth status', 'Auth/ref', and 'Name'. The table contains several rows of data, including '100 1 Cricket, Jiminy'. A dialog box titled 'Submit for Review' is open, prompting the user to 'Enter the institutions you want to review this record (institution symbols should be separated by semicolons)'. The input field contains 'tjc;dlc'. The dialog box has 'OK' and 'Cancel' buttons.

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13

Reviewers may sort by OCLC symbol

The screenshot shows the 'Search Online Authority Save File' dialog box. It contains a search area with fields for 'Search for:', 'in', 'AND', 'in', and 'with:'. The 'with:' field is set to 'Workflow Status'. There are checkboxes for 'Submitted for Review' (checked) and 'Retain Search' (unchecked). Below the search area, there is a 'Review File' section with a checkbox for 'All Review File Records' (unchecked) and a checkbox for 'Review File Records for Institution:' (checked). The 'Institution' field is set to 'tjc'. A question mark icon is visible next to the 'Review File' section.

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14

RLIN updated for MARC 21

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15

RLIN review options

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16

What kind? How many?

- Send both easy and tough records
- Send lots, but no more than 10-15 at a time
- Make corrections before sending more
- Use the 952 for questions and comments

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17

Send separate emails

- Avoid overloading emails with multi-problems.
You may group:
 - Several record ID numbers for review
 - Several simple duplicates, cancellations
 - Several routine BFM reports
 - But! only one nasty problem per message

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18

Non-roman records

- Send both SAR and surrogate pages for items
- Label them for easy matching
- Fax to reviewer
- LC Coop Team's fax 202-252-2082

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19

Formal review

- After initial review, formal review toward independence
- A representative range of records (language, levels of difficulty)
- In sufficient volume
- No more than 10% error rate in areas that affect access

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20

After gaining independence...

- Independent library handles its own review and quality control
- Send queries to LC Liaison as needed
- Send bib record IDs with BFM, if possible
- Adjust duplicates before sending, and tell which to keep and which to cancel

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21

Keep work current

- Avoid backlog in local or utility save files
- 24-hour rule-- Any record that's been in a save file for over 24 hours must have 1XX and 4XX searched before contribution!!

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22

One NACO contact

- To keep communications straight, one NACO contact works with a reviewer
- Have a back-up NACO contact
- Provide continuity when staff changes
- Help us update our databases

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23

Keep in touch

- Let us know if problems arise
- Follow up if queries are unanswered
- Coordinator Series PCC 2005
David Saah
202-707-3131
dsaa@loc.gov

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24

Track your contributions

- Semi-annual stats on web page:
www.loc.gov/catdir/pcc/stats/stats.html
- Monthly contribution stats appear sorted by institution name
- New and changed SARs count toward annual institutional goals

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25

Training resources online

- Training Materials for PCC Series Institutes:
<http://www.loc.gov/catdir/pcc/naco/series/serieshp.html>
- Training Materials for NACO workshops:
<http://www.loc.gov/catdir/pcc/naco/trainees.html>

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26

Subscribe to PCClist

- Announcements, policy changes, discussions
- List limited to contributing PCC libraries
- Send message to LC Liaison or NACO Coordinator to subscribe name(s):

dsaa@loc.gov David Saah

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27

Visit the PCC Web page

- PCC governance and programs
 - Calendar
 - Announcements, archives, stats
 - Documentation, FAQs, and links
- <http://www.loc.gov/catdir/pcc/>

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28

Meet PCC partners at ALA

- SACO workshops
- PCC Participants
- BIBCO/CONSER-at-Large meetings
- Agendas and Summaries on PCC web page

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Session 14

29

Other training opportunities

- SACO workshops at ALA
- BIBCO training at your institution
- CONSER training at your institution
- Train the NACO/BIBCO/Series Trainer

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30

Complete evaluations and send

- Online evaluation is the best option:
http://www.loc.gov/catdir/pcc/naco/series/series_eval.html
- If you use paper evaluation form —prefer other shipping services over USPS to avoid security screening delays